# CAR.ODR.com Handbook for Mediators

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Contact us with any questions at: Elizabeth Lesser 213-739-8261 Maria Wilson 213-739-8260 mediation@car.org

### Logging into the Platform

When your mediator account is added to the system, you will receive an auto-email from <u>no-reply@car.odr.com</u> to create a password.

If you do not receive this email, (or do not remember your password), visit <u>http://car.odr.com</u> to access the platform. You may click Forgot Password. This will trigger an email link to be sent to you to reset your password.

$\leftarrow$	C	â	https://car.odr.com	Å.	☆	) 👂	181	2	ĠШФ	£≡	G.	<b>~</b> ;	8	0
				REAL ESTATE MEDIAT CENTER FOR CONSUM	ON									
				Get your cases resolved - qui amicably	kly and									
				Your Email Address										
				katyperry@mailinator.com	••••]									
				Your Password										
					••••1	0								
				Forgot Password ?	>									

### **Editing Your Profile**

Enter your email and password to log in. Once you log in, you'll see the below overview page. To edit your profile, click on "My Neutral Bio" in the top menu.

REAL ESTATE MEDIATION CENTER FOR CONSUMERS	Home	My Neutral Bio	Manage Users -
My Cases			
Showing 7 out of 7 CASE II	) : 21		
	Katy Per vs Taylor Sv	-	
		n Case	

You will see your profile where you can edit the following sections:

- 1. Contact information You can provide contact information for yourself and your assistant (if applicable). You can also provide further details about if and where you offer in-person services.
- 2. Fees Include any additional fee information (such as travel fees or deposit information) under additional fee information.
- 3. Specialties Select any checkboxes to indicate your specialties and add additional specialties in the notes.
- 4. Education You may include your education and any relevant certificates in this section.
- 5. Professional experience If you have any professional experience that you would like to reference, you may do so here.
- 6. Affiliations You may list any affiliations, such as bar associations, ADR organizations, etc.
- 7. Statement Include a statement here for parties to understand your mediation philosophy.
- 8. Foreign languages Select any foreign languages that you speak here.

Edit Profile	Add Mediator	
	Contact In	formation*
		My Profile
		Add profile pictur
	First Name *	
	Stephen	
	The maximum characters allowed for this field is 128. Last Name *	
	Curry	
	The maximum characters allowed for this field is 128.	
	Email *	
	stephencurry@mailinator.com	

Add Mediator		
•	Contact Information*	
•	Fees*	
•	Specialties*	
•	Education	
•	Professional Experience	
•	Affiliations	
•	Statement	
0	Foreign Languages	

To select a section to view & edit, click on the blue heading.

When you are done editing, click save. You must complete the required (\*) fields prior to saving.

## When you are proposed as a mediator

If you are proposed as a mediator, you will receive an email notification. This is just a notification, and no action is required until a case is assigned. You do not need to confirm to us that you have received the notification. This will help you track how often you are proposed for mediations under the program.

#### You have been proposed for a new mediation



C.A.R. Mediation Center <no-reply@car.odr.com> To mohan+n3@crekodr.com Cc Mediation Retention Policy Car Retention Policy (2 years)

() If there are problems with how this message is displayed, click here to view it in a web browser.

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless yo

Hello Mohan N1.

You have been proposed as a mediator for Case 17. We will let you know if the parties select you as the mediator.

Regards,

C.A.R. Real Estate Mediation Center

mediation@car.org

213-739-8376

#### When you are selected as a mediator

When you are assigned to a case, you will receive an email notification.

You have been selected as the mediator RE: 525 S. Virgil Avenue Los Angeles CA 90020 D Tresh x

C.A.R. Mediation Center <no-reply@car.odr.com> to me 💌</no-reply@car.odr.com>	Feb 14, 2024, 3:07 PM (1 day ago)
Hello Lizzy Lesser,	
You have been accepted as the mediator for 525 S. Virgil Avenue Los Angeles CA 90020. Please login to your account to review the case.	
To get started, you are kindly requested to follow the steps listed below:	
1) If this is your first time on the Caseload Manager, Click Here to set password and access your case.	
2) If you have already set a password, then Login Here with your password.	
Regards,	
C.A.R. Real Estate Mediation Center	
mediation@car.org	
213-739-8376	

You will be prompted to go into Caseload Manager to perform a conflict check. You may do this by reviewing Intake Details, Documents, & Users.

If you can accept the matter, you should add a message to Case Home. This will inform the parties & program staff that you have accepted the matter.

E Case Home	CASE ID : 21	Add New Message
r≡ Case Detail		
⊯ Intake Details	Welcome to C.A.R. Mediation!	
@ Documents	Thank you for selecting me as your mediator. I have completed my conflict check and can accept this matter. Please refer to discus information.	ssions for further
au Users		
Discussions	Created by : Stephen Curry	Feb 9, 2024, 12:14:27 PM

If you have any disclosures for the parties to review or any other matters to communicate to the parties, please email them directly. If you must decline the matter, please inform program staff at <u>mediation@car.org</u>.

If the parties select another mediator, you will also receive a notification informing you.

Parties Selected Another Mediator

CM C.A.R. Mediation Center <no-reply@car.odr.com> To mohan+n3@crekodr.com Cc Mediation Retention Policy Car Retention Policy (2 years) (1) If there are problems with how this message is displayed, click here to view it in a web browser.

CAUTION: This email originated from outside of the organization. Do not click lii

Hello Mohan,

The parties have selected another mediator for Case 17.

Regards,

C.A.R. Real Estate Mediation Center

mediation@car.org

213-739-8376

#### Viewing a Case

To view the cases assigned to you, click on home. Once you click on a case, you'll land on that case's home screen.

REAL ESTAT CENTER FOR	E MEDIATION Ho R CONJUMERS	ome My Profile	Manage Users <del>▼</del>		C.A.R
Му Са	ISƏS				
	ASE ID : 1 Mohan vs Larry Open Case				
REAL ESTA CENTER FO	TE MEDIATION H	lome My Profile	Manage Users <del>√</del>		C.A.R
CENTER FO CENTER FO Case Ho Case Ho Ca	Details Pants	iome My Profile	Manage Users↓ CASE ID : 1	Add New Message	C.A.R YOUR NEXT STEP(S) There is no action required at your end. My Calendar No events scheduled

### Case Home

On the case home screen, anyone associated with the case (including mediation participants and program staff) will be able to post a message that is **visible to all case participants**.

Case Home	CASE ID : 1	sage YOUR NEXT STEP(S)
Intake Details		
Documents		There is no action required at your end.
Users		My Calendar
Discussions		
Calendar	No messages found.	No events scheduled

If you click "Add New Message," the following screen will open for messages. You may use this feature to communicate important notices such as key contact information, important deadlines, etc. These messages may be deleted by the individual that posted them after they have been saved. Parties will not currently receive email notifications when a message has been posted. We recommend following up them via phone/email to confirm receipt. We are also reminding parties to check the status of the mediation in the system.

 Add a note	×	
Title: *		dd New Message
Note: *		
B I U Normal ≑ ﷺ I <sub>x</sub>		
Insert text here		
Important Information: This note is visible to all the case parties		
Sav	e	

The case home will list any next steps that are due. You should not see any items listed here. This will only apply to program staff and parties prior to the matter being assigned to you.

If you ever notice that Your Next Steps disappears, please click the arrow circles to refresh the menu options.

REAL ESTATE MEDIATION CENTER FOR CONSUMERS	Home My Profile Mar	age Users <del>▼</del>		6
CENTER FOR CONSUMERS		CASE ID : 1	Add New Message	YOUR NEXT STER(S)
Copyright © 2023 CASELOAD	MANAGER All rights reserved.	Version 1.32		

If you enter a <u>calendar item</u>, they will be listed on the case home for quick reference.

5 Case Home	CASE ID : 1		YOUR NEXT STEP(S)
≅ Intake Details		Add New Message	YOUR NEXT STEP(S)
@ Documents			There is no action required at your end.
# Users			
Discussions		. (	My Calendar
■ Calendar	No messages foun	a.	No events scheduled
	ghts reserved. Version <b>1.32</b>		

#### **Intake Details**

If you click on "Intake Details", you'll see all the information that was submitted by the filer when they created the case. This will be visible to everyone associated with the case.

#### California Association of REALTORS® Real Estate Mediation Center for Consumers

0			CASE ID : 1			
Case Home	INTAKE SOURCE : 1					
E Intake Details	Page : 1 / 4	Reque	st to Mediate			
Docentin	A copy of the Requ	lest to Mediate For	n will be visible to Part	ties and their Atto	rneys and Representatives.	
users	Subject Property A	ddress*				
Discussions	···· 1st street					
Calendar	CA		CA		33746	
	to your mediator once th Deposit dispute Failure to disclose a Landlord-tenant dis Homeowners assoc	for the dispute (Select all le mediation is confirmed. known defect pute		the opportunity to provi	ide further details and a mediation brie	f directly
	Other Estimation of Dispute Vi shared with Responding \$10,001 to \$25,000					

#### **Documents**

If you click on "Documents," you will see the documents that have been uploaded into the case and shared with you. Individuals uploading documents may specify which individuals will have access to uploaded documents. When we assign a case to you, we will upload any documents we have received here. **Parties will not currently receive email notifications when a document has been posted.** 

Case Home				CASE ID : 6					
≡ Case Detail	Documents							Add Doo	ument
	Category		Do	cument Title					
Documents	All		~ s	earch					
	Documents	Category	Document Ti	Document D	Uploaded By	Created Date	Shared With	Delete	
Discussions	CAR Sample	Others	CAR Sample		Taylor Swift	12/11/2023	+	Î	î
Calendar	Document		Document 1						
	1.pdf								
	CAR Sample	Others	CAR Sample		Katy Perry	12/11/2023	±		
	Document		Document 2						
	2.pdf								
	CAR Sample	Dialogue	CAR Sample	CAR Sample	Indraneel N1	12/11/2023	+		v

If you'd like to upload a document, click "Add Document" and you'll be presented with a menu to upload the document, a drop down to categorize it, a description box, and options to decide who in the case will be able to see it. Anyone associated with the case will be able to access documents that are shared with them and share documents through this section.

REAL ESTATE MEDIATION Hom	ne My Profi	ile Manage Users▼			C.A.R	C
Case Home			Upload Document	x		
≔ Intake Details	Docum	Choose File house receipt.pd	f		Add Document	
@ Documents		Category:* Others		~		
# Users		Document Title:				
Discussions		house receipt				
Calendar		Document Description:				
		this is a receipt for work done	on the house over the period	of <u>July</u> 10-17, 2023.		
		Share with:				
		Initiating Party	Mediator 🗌	Responding Party		
		Mohan	Colin Rule	Larry	<b>v</b>	

To open a document posted by someone else, you may double click on the document name.

Case Home				CASE ID : 6					
≣ Case Detail	Documents							Add Doc	ument
≡ Intake Details	Category		Doc	ument Title					
Documents	All		~ 54	arch					
u Users		Category	Document Ti	Document D	Uploaded By	Created Date	Shared With	Delete	
Discussions	CAR Sample	Otters	CAR Sample		Taylor Swift	12/11/2023	<b>±</b>		î
Calendar	Document		Document 1						- 11
	1.pdf								- 11
	CAR Sample	Others	CAR Sample		Katy Perry	12/11/2023	<b>*</b>	Ē	
	Document		Document 2						
	2.pdf								
	CAR Sample	Dialogue	CAR Sample	CAR Sample	Indraneel N1	12/11/2023	<b>.</b>		-

#### Add & Unassign Users (within a case)

Refer to users within Case Home to add or unassign users from a case (do not attempt to do so within Manage Users in the top navigation). If you click "Users," you can see all the users who have been added into the case. **This will be visible to everyone associated with the case**.

Case Home			CASE ID : 1		d person on file	Add Case Participants
æ Intake Details	CONTACTS					Add Case Participants
4 Decements	Role	Full Name	Email ID	Phone	Contact For	
4 Users	Initiating Party	Mohan	mohan+c1@crekodr.com	48756		Unassign
Se Discussions	Mediator	Colin Rule	crule+n1@mediate.com			
<b>≝</b> Calendar	Responding Party	Larry	larry@mailinator.com			Unassign
			l			

To remove someone from the case, click "Unassign."

Case Home			CASE ID : 1			
Case Home				Add	d person on file	Add Case Participants
E Intake Details	CONTACTS					
Documents	Role	Full Name	Email ID	Phone	Contact For	
users	Initiating Party	Mohan	mohan+c1@crekodr.com	48756	(	Unassign
Discussions	Mediator	Colin Rule	crule+n1@mediate.com			
Calendar	Responding Party	Larry	larry@mailinator.com			Unassign

Follow these instructions to add an <u>existing user</u> to the case (someone who is already registered in the <u>http://car.odr.com</u> system). To determine if someone is already a user, click the "Add Person on File" button and search by name or email. If they are an existing user, you can add them to the case here by selecting the user's name and their role in this case (Initiating Party, Responding Party, Interested Person, etc) from the dropdowns. Hit submit to add them to the case. If they are not in the case, refer below to add a new user. **Only mediators and program staff will be able to assign or unassign participants to a case.** 

REAL ESTATE MEDIATION CENTER FOR CONSUMERS	e My Profile Manage Users -					C.A.R	C	
Case Home			CASE ID : 1					
				A	dd person on file	A) Case Participants 🚽		
≔ Intake Details	CONTACTS							
& Documents	Role	Full Name	Email ID	Phone	Contact For			
4: Users	Initiating Party	Mohan	mohan+c1@crekodr.com	48756		Unassign		
Discussions	Mediator	Colin Rule	crule+n1@mediate.com					
Calendar	Responding Party	Larry	larry@mailinator.com			Unassign		
			Add Exisiting Person				Submit	>
			Add Exisiting Person				Submit	>
Persons			Add Exisiting Person				Submit	>
Persons			Add Exisiting Person				Submit	>
Persons							Submit	>
							Submit	2
Persons Person Type:			•				Submit	3
							Submit	>
			•				Submit	×
			•				Submit	×
			•				Submit	×
			•				Submit	×

To add a <u>new user</u> (someone who is not registered in the <u>http://car.odr.com</u> system), click "Add Case Participants." You will then select the type of user from the dropdown.

taff on file Assign ACTS	n Mediator			Add per an on file Add Case Participants - Add Initiating Party
Role	Full Name	Email ID	Phone	Add Responding Party Add Mediator
Admin	Elizabeth Lesser	elizabethl@car.org	213-739-8261	Add Initiating Party Representative Add Responding Party Representative
Admin	Mohan N	mohan@crekodr.com		Add Interested person
Initiating Party	Mohan	mohan+c1@crekodr.com	3457634	Add Admin Add Attorney
Mediator	Mohan N1	mohan+n3@crekodr.com		Add Other Add Interested Person Representative
Responding Party	Larry	larry@mailinator.com		Unassign

Once you enter their contact information and hit submit, the new participant will be added to the case. They will appear in the user table and be sent an email to set a password and log in.

CENTER FOR CONSUMERS	Add	Responding Party	× 1
Case Home			Case Participants 👻
≡ Intake Details	Add Person Details		
Documents			
users	User Type *	Email *	Unassign
Discussions	Select	~	
		The maximum characters allowed for this field is 128.	Unassign
Calendar	Organization	Address1	Unassign
	The maximum characters allowed for this field is 128.	The maximum characters allowed for this field is 1000.	
	City	State	
	The maximum characters allowed for this field is 1000.	The maximum characters allowed for this field is 1000.	
	Zip	Phone	
	The maximum characters allowed for this field is 1000.	The maximum characters allowed for this field is 1000.	
	Confidential notes		
		Subm	

If you have multiple Initiating or Responding Parties with different attorneys, when you click "Add Initiating/Responding Party Representative," you will be able to select which party the attorney represents.

User Type *	Full Name *
Select	~
	The maximum characters allowed for this field is 256.
Email *	Organization
The maximum characters allowed for this field is 128.	The maximum characters allowed for this field is 128.
Address1	City
The maximum characters allowed for this field is 1000.	The maximum characters allowed for this field is 1000.
State	Zip
The maximum characters allowed for this field is 1000.	The maximum characters allowed for this field is 1000.
Phone	Confidential notes
The maximum characters allowed for this field is 1000.	
The maximum characters allowed for this field is 1000.	
Parties *	
John Perry Katy Perry	

#### Discussions

Program staff will not be able to view the discussions. They will only be able to see that you have opened the discussion.

You control when the discussion forum is opened to the parties. You can use the discussion for confidential discussions with all participants. This is intended for pre or post mediation discussions with the parties (such as to coordinate a mediation date or to further discuss settlement details after a mediation).

If you click "Discussions" in the left-hand menu, you will see a page notifying you that no discussion has been set up yet.



If you click "Open Joint Discussion" you'll be presented with a pop-up confirmation box asking if you want to start the mediation.



When you click ok, the joint discussion will be opened to all participants.



In the joint discussion, you can type in a message in the text box at the bottom of the page and hit "send." The message will appear to all participants. **Parties will not currently receive email notifications when a message has been posted in discussions.** 

REAL ESTATE MEDIATION Home CENTER FOR CONSUMERS	My Profile Manage Users -	C.A.R
谷 CASE HOME	CASE ID : 12 Create new room Joint Discussion - Colin Rule, Amy Foote , Lara Fischman	Click here to pause
Contractoson Contractoson Arny Foote Lara Fischman	B I U Normal ≎ ⊨ Ξ I <sub>x</sub> Type Massage	Ø
		Send

You may "Click here to pause" the joint discussion if needed and direct parties to their separate caucus rooms.



When you are ready to resume a joint discussion, you may reopen it. Only the mediator will have the ability to pause and resume the discussion.

Create new room	CASE ID : 11
Joint Discussion - Taylor Swift , Katy Perry	y , Stephen Curry
	This discussion is temporarily paused.
	Click here to resume

If you want to open a new room (e.g. a caucus room), click "Create new room" at the top of the page.

REAL ESTATE MEDIATION Home CENTER FOR CONSUMERS	My Profile Manage Users -	C.A.R
A CASE HOME	CASE ID : 12 Create new room	
	Coucus with Camy - Colin Rule, Amy Foote	Click here to pause
CAUCUS WITH AMY Colin Rule Amy Foote	B I U Normal ≎ i≣ ≔ I <sub>x</sub>	Ø
JOINT DISCUSSION Colin Rule	Here is a new message in the caucus space only for Amy and Colin	
Amy Foote		
Lara Fischman		

You can then name the room and specify who will be in the new room by selecting the checkboxes next to the names of the parties you'd like to include.

REAL ESTATE MEDIATION Home M CENTER FOR CONSUMERS	ly Profile	Manade Users - Ci	reate Room	Save & create room		C.A.R	G
CASE HOME	Create r Join	Room Name: Caucus with Amy				Click here to pause	
JOINT DISCUSSION Colin Rule Amy Foote Lara Fischman	C	Select Party: ✔ Amy Foote - Initiating Party ☐ Lara Fischman - Responding Party	Select Neutral: ☑ Colin Rule - Mediator	04	23 4:24:22 PM		

Once you click "Save & Create Room" your room will be created and will appear in the left-hand menu. When you click on it, you can post a message just in that room – only the parties who are in the room will be able to see it.

	CASE ID : 12	
😤 CASE HOME	Caucus with Amy - Colin Rule, Amy Foote	Click here to pause
CAUCUS WITH AMY		
Colin Rule Amy Foote	B I U Normal ≎ )≣ ≔ I <sub>×</sub>	Ø
JOINT DISCUSSION	Here is a new message in the caucus space only for Amy and Colin	
Colin Rule		
Amy Foote Lara Fischman		
Land Filleringh		
		Send

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You can also attach a file to a message posted in the discussion forums – just click the paper clip icon in the upper right of the "post a new message" text box and you can select a file to attach to your message.

L ESTATE MEDIATION TER FOR CONSUMERS	My Profile Manage Users -		C.A
A CASE HOME	CASE ID : 12 Create new room Caucus with Amy - Colin Rule, Amy Foote	Click here	to pause
CAUCUS WITH AMY Colin Rule Amy Foote	Colin Here is a new message in the caucus space only for Amy and Colin	19-Dec-23 3:59:20 PM	n
Joint Discussion Colin Rule Amy Foote Lara Fischman	Colin ★ Penn negotation syllabus.pdf	19-Dec-23 4:02:35 PM	0
	Colin There's the file I told you about	19-Dec-23 4:02:50 PM	n
	B I U Normal ≑  Ξ ≔ I <sub>*</sub>	(	0
		Se	nd

Once you send, it will appear in your discussion thread (and it will be added to the documents area in the case as well).

### Calendar

To create a new calendar item (e.g., any meeting around the mediation), click on calendar.

	REAL ESTATE MEDIATION CENTER FOR CONSUMERS	Home	My Profile
	Case Home		
	a Intake Details ≝		
	Ø Documents		
	👪 Users		
	Discussions		
	Calendar		
Ne	ext, click add cale	endar i	tem.

otal hours : - Total session	:-	c	ASE ID : 11		Ad	d Calendar Item
Meeting Start Time	Meeting End Time	Meeting Title	Meeting Type	Rooms & Resources	Notes	
			No Rows To Show			

Fill out page 1 with the event details and click next.

End date/time * 1/10/2024, 3:30 PM Type	
Туре	
Online	

Select the program staff and parties to receive an email notification about the calendar item being added.

Event Details Page	2 Invitee Details
Staff: Required * Admin Colla Rule (crule@mediate.com) Admin Indraneel Scrule (mediate.com) Admin. Nothane (motion Resolution) Admin. = Elizabeth Lesser (clicabeth@ccurorg)	Î
OSelect Parties by role  Select Parties	
Select parties from this case Initiating Party - Katy Perry Responding Party - Taylor Switt	
Associate Panelist in case Panelist - Stephen Curry (stephencurry@mailinator.com)	ĵ
Back	Submit

When you click submit, everyone selected will be notified about the calendar item being added both by email & a calendar item listed within the platform.

Total hours : - Total session :					Add Calendar Item
Meeting Start Time	Meeting End Time	Meeting Title	Meeting Type	Rooms & Resources	Notes
2024-01-10 12:30:22	2024-01-10 15:30:36	Mediation Session	Online		Zoom link:

### Edit Existing Users

When you login to your account, you will see that you have a tab called Manage Users.



This will list all users (parties, counsel & Interested Persons) who have an account in the system. It does not identify any information about the case(s) that they are associated with.

If you need to revise contact information for parties, click Manage Users and then Manage Persons. Refer to <u>Add and Unassign Users</u> to determine if a user already has an account in the system.

REAL ESTATE MEDIATION CENTER FOR CONSUMERS	Home	My Neutral Bio	Manage Users -
My Cases			Manage Persons

To search for a user you need to edit, click filter to search.



We recommend searching by email address. Select "=" and then insert email address and hit apply.

			Display Filters
Choose from saved view			
User sub type		~	CLEAF
FirstName		• •	
LastName		1	
Email	=	~	testrespondingparty@mailinator.com
UserPreierenee			
ConfidentialNotes		~	
Display Name		~	

This will display only the user with the specified email address.

<b>T</b> Filter	☑ Select Fields	et Export	+ Add User			
Filter:Email = testrespondingparty@mailinator.com						
User sub type Display Name						
Responding Party		Test R	Responding Party (test)			

If you need to edit the contact information, you may edit the fields and click submit. NOTE: If a user requests that you change their email address on file, you will need to create a new user. You may refer to Add & Unassign Users to do this.

Send us an email requesting the unused email address account be deleted from the system.